



06 Dec.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,118	0.0 %	9.5 %
BSE SENSEX	32,802	(0.2) %	9.7 %
CNX BANK	25,125	0.0 %	16.6 %
CNX MIDCAP	19,756	0.0 %	14.0 %
CNX SMALLCAP	8,493	0.0 %	20.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,181	(0.5) %	21.6 %
S&P 500	2,630	(0.4) %	16.5 %
FTSE 100	7,328	(0.2) %	2.1 %
HANG SENG	28,843	(1.0) %	30.2 %
NIKKEI	22,622	(0.4) %	15.5 %
SHANGHAI COMPOSITE	3,304	(0.2) %	5.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.39	(0.1) %	(4.5) %
EUR/USD	1.18	(0.6) %	11.6 %
GBP/USD	1.34	(0.4) %	9.2 %
USD/JPY	112.35	0.2 %	(3.1) %
USD/AUD	1.32	0.3 %	(3.7) %
USD/SGD	1.35	0.1 %	(5.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(1.5) %	9.8 %
Gold(INR/10g)	29,068	(0.1) %	4.5 %
Gold Comex(USD/oz)	1,279	(0.4) %	10.5 %
SILVER(INR/1Kg)	37,585	(0.1) %	(3.4) %
Aluminium(USD/MT)	2,053	0.3 %	20.6 %
Copper(USD/MT)	6,807	1.1 %	22.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.0 %	(0.1) %

Global Economy: Activity in the US service sector grew at a slower than expected rate in the month of November, the Institute for Supply Management revealed in a report released on Tuesday. The ISM said its non-manufacturing index dropped to 57.4 in November from 60.1 in October. The US trade deficit widened to \$48.7 billion in October from a revised \$44.9 billion in September. China's private sector growth edged up marginally in November, survey results from IHS Markit revealed. The Caixin composite output index rose to 51.6 in November from October's 16-month low of 51.0.

Global Equities: Dow slipped from record high on concerns about the outlook for the Republican tax reform bill amid reports about disagreements over a corporate alternative minimum tax.

Indian Economy: Indian service sector dipped into contraction territory during November, following growth in the previous two months. This was matched by a reduction in new work. Panellists widely blamed the deterioration in business performance to the goods and service tax (GST). Meanwhile, cost pressures intensified during the latest survey period. With confidence its highest in four months, companies added to their staffing levels for a third month in succession, albeit to a relatively modest degree. Posting below the no-change mark of 50.0 in November, the seasonally adjusted Business Activity Index signalled a contraction of the service sector for the first time in three months. That said, the rate of decline was modest.

Equity Markets: Local indices recorded a small decline in a volatile session of trade. Both the Sensex and the Nifty settled at their lowest levels in almost three weeks. Negative global cues and weak Nikkei India services PMI data weighed on investors' sentiment in today's trade. Also investors maintained caution ahead of the Reserve Bank of India's monetary policy decision today. Key indices traded lower for most part of the session after hitting fresh intraday low in early trade. The Sensex hit a six-week low and the Nifty hit its lowest intraday level in almost 8 weeks in early trade.

Corporate News: Metals and mining counters would be in focus as global Copper prices tumbled near five percent yesterday amid rising LME inventories and heavy selling pressure. Torrent Pharmaceuticals said that the company has issued non-convertible debentures on private placement basis for Rs 500 crore. The coupon rate on debentures is 7% per annum. The tenor of the debentures is 360 days, with date of maturity being 29 November 2018. Tata Communications will be in focus as international fleet management application provider, DRVR has selected Tata Communications as its global IoT connectivity partner to help achieve its objective of making Asia's vehicle fleets the smartest and most cost-efficient in the world.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	0.6	0.6	10.9
MF(INR cr)	299.6	561.5	598.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,682	30,345	32,027
F&O(INR cr)	511,011	446,057	610,193

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.7	11.6	11.0
NSE VIX	15.0	14.9	12.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,125	0.2 %	16.6 %	Energy	13,942	0.3 %	18.0 %
IT	11,025	(0.5) %	4.1 %	Pharma	9,043	(0.1) %	(13.9) %
Metals	3,601	(0.8) %	16.0 %	Finance	10,251	0.1 %	16.2 %
Auto	11,101	(0.5) %	11.9 %	PSU	3,832	1.4 %	8.7 %
FMCG	25,696	(0.2) %	8.7 %	Real Estate	316	(0.6) %	44.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shriram Tr	1,373	6.1 %	24.3 %	Hero Motoc	3,521	(2.2) %	9.9 %
Petronet L	250	2.9 %	20.5 %	Wipro	283	(2.2) %	11.8 %
United Spi	3,397	2.6 %	66.0 %	Ashok Leyl	114	(2.0) %	35.6 %
Bajaj Fin.	1,707	1.9 %	44.5 %	Oil India	354	(1.8) %	7.3 %
Yes Bank	309	1.8 %	0.3 %	O N G C	178	(1.8) %	(4.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (NOV)	06-12-2017	22:30	AUD	-	53.2
Gross Domestic Product (QoQ) (3Q)	06-12-2017	0:30	AUD	-	0.008
Gross Domestic Product (YoY) (3Q)	06-12-2017	0:30	AUD	-	0.018
Bank of Canada Rate Decision (DEC 06)	06-12-2017	15:00	CAD	-	0.01
Labor Productivity (QoQ) (3Q)	06-12-2017	13:30	CAD	-	(0.001)
Consumer Price Index (MoM) (NOV)	06-12-2017	8:15	CHF	-	0.001
Consumer Price Index (YoY) (NOV)	06-12-2017	8:15	CHF	-	0.007
CPI EU Harmonized (MoM) (NOV)	06-12-2017	8:15	CHF	-	0.001
CPI EU Harmonized (YoY) (NOV)	06-12-2017	8:15	CHF	-	0.008
ECB Executive Board member Yves Mersch speaks in Frankfurt	06-12-2017	10:30	EUR	-	-
German Factory Orders (MoM) (OCT)	06-12-2017	7:00	EUR	-	0.01
German Factory Orders n.s.a. (YoY) (OCT)	06-12-2017	7:00	EUR	-	0.095
Markit Eurozone Retail PMI (NOV)	06-12-2017	9:10	EUR	-	51.1
Markit France Retail PMI (NOV)	06-12-2017	9:10	EUR	-	51.5
Markit Germany Construction PMI (NOV)	06-12-2017	8:30	EUR	-	53.3
Markit Germany Retail PMI (NOV)	06-12-2017	9:10	EUR	-	51.2
Markit Italy Retail PMI (NOV)	06-12-2017	9:10	EUR	-	50.3
BOJ Masai makes a speech	06-12-2017	1:30	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	06-12-2017	1:10	JPY	-	-
Foreign Buying Japan Bonds (DEC 01)	06-12-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (DEC 01)	06-12-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (DEC 01)	06-12-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (DEC 01)	06-12-2017	23:50	JPY	-	-
Official Reserve Assets (NOV)	06-12-2017	23:50	JPY	-	-
QV House Prices (YoY) (NOV)	06-12-2017	16:00	NZD	-	0.039
ADP Employment Change (NOV)	06-12-2017	13:15	USD	-	-
DOE Cushing OK Crude Inventory (DEC 01)	06-12-2017	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (DEC 01)	06-12-2017	15:30	USD	-	-
DOE U.S. Distillate Inventories (DEC 01)	06-12-2017	15:30	USD	-	-



DOE U.S. Gasoline Inventories (DEC 01)	06-12-2017	15:30	USD	-	-
MBA Mortgage Applications (DEC 01)	06-12-2017	12:00	USD	-	(0.031)
Nonfarm Productivity (3Q F)	06-12-2017	13:30	USD	-	0.03
Unit Labor Costs (3Q F)	06-12-2017	13:30	USD	-	0.005

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